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Estate Planning 2023 . . . Basics & Beyond

Let's choose Executors and talk of Wills.
King Richard – Richard II (Act 3 Scene 2)

With the Federal and Connecticut estate tax exemption close to $13 million, many people believe that estate planning is less important. Actually, this offers families the ability to focus on a wider scope of important issues. These include, how to:

- Protect assets for children when one spouse dies and the surviving spouse remarries
- Provide for a child with special needs without causing the loss of government benefits
- Give the Executor access to digital assets while limiting certain access for privacy reasons
- Balance the inheritances for children based on different circumstances
- Transfer a business to the next generation or sell it to a willing buyer

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This one-hour program will cover the core documents of estate planning: Wills, Trusts, Powers of Attorney, and Health Care Directives. But it will also include case studies and address often overlooked aspects essential to a modern approach to estate planning, such as: maximizing "basis step-up" to reduce capital gains tax; coordinating beneficiary designations; choosing the right fiduciaries; legacy planning; and even the use of pet trusts.

Estate planning in 2023 is also about life planning – from gifting to children and grandchildren to asset protection to compassionate care for elderly parents. Join attorneys, Steve Pappaterra and Katherine Brennan, for a presentation that promises to be informative, interactive, and (dare we promise) "anything but dull."

Stephen Pappaterra, Esq. has a diverse background as an attorney, wealth management executive, professor, and professional drummer. He is Co-Founder and President of Syncopate Creative, LLC, a consulting firm that provides creative direction on presentations, positioning, and performance for professional services firms. In addition to practicing law at two prominent regional law firms in New Jersey and Philadelphia, Steve spent 14 years as National Director of Wealth Planning for PNC Wealth Management, where he led a team of 80+ attorneys, CPAs, and certified financial planners. He has lectured and published widely in professional journals, and has been interviewed numerous times for major media outlets.

Steve received his B.A. and J.D. from Rutgers University.

Katherine A. Brennan, Esq. is an associate at the law firm of Davis+Gilbert where she supports high net-worth individuals, multigenerational families, trusts, and business entities in their wealth planning goals. With a highly accessible and responsive approach and working closely investment managers, she focuses on providing tax-efficient solutions throughout major life changes designed to meet client objectives, maintain generational harmony, and achieve their philanthropic mission.

Katherine is a graduate of American University (B.A., summa cum laude). She earned her law degree at the University of Miami School of Law (J.D., summa cum laude, as well as her LL.M. in Arts and Entertainment Law). She is admitted to practice law in New York, New Mexico, and South Carolina.